



1/20

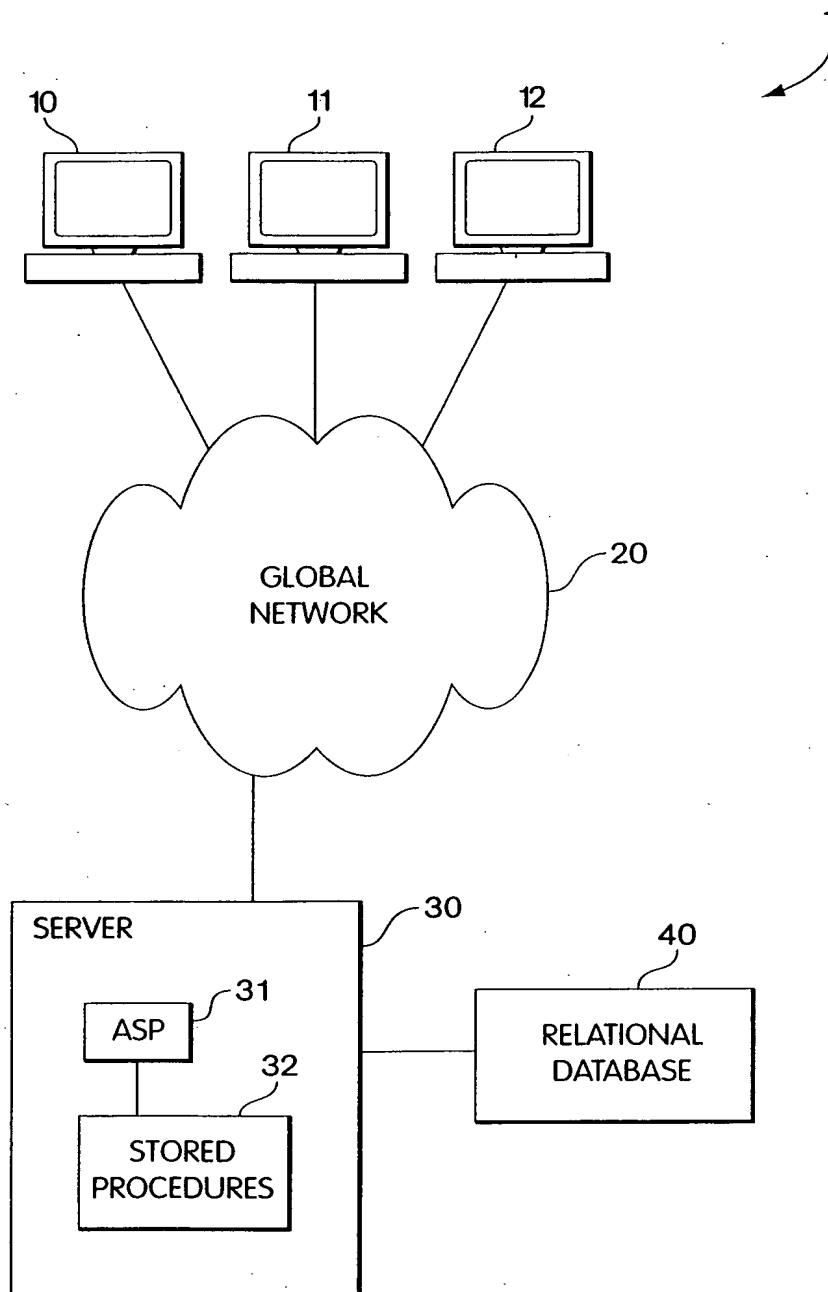


Fig. 1

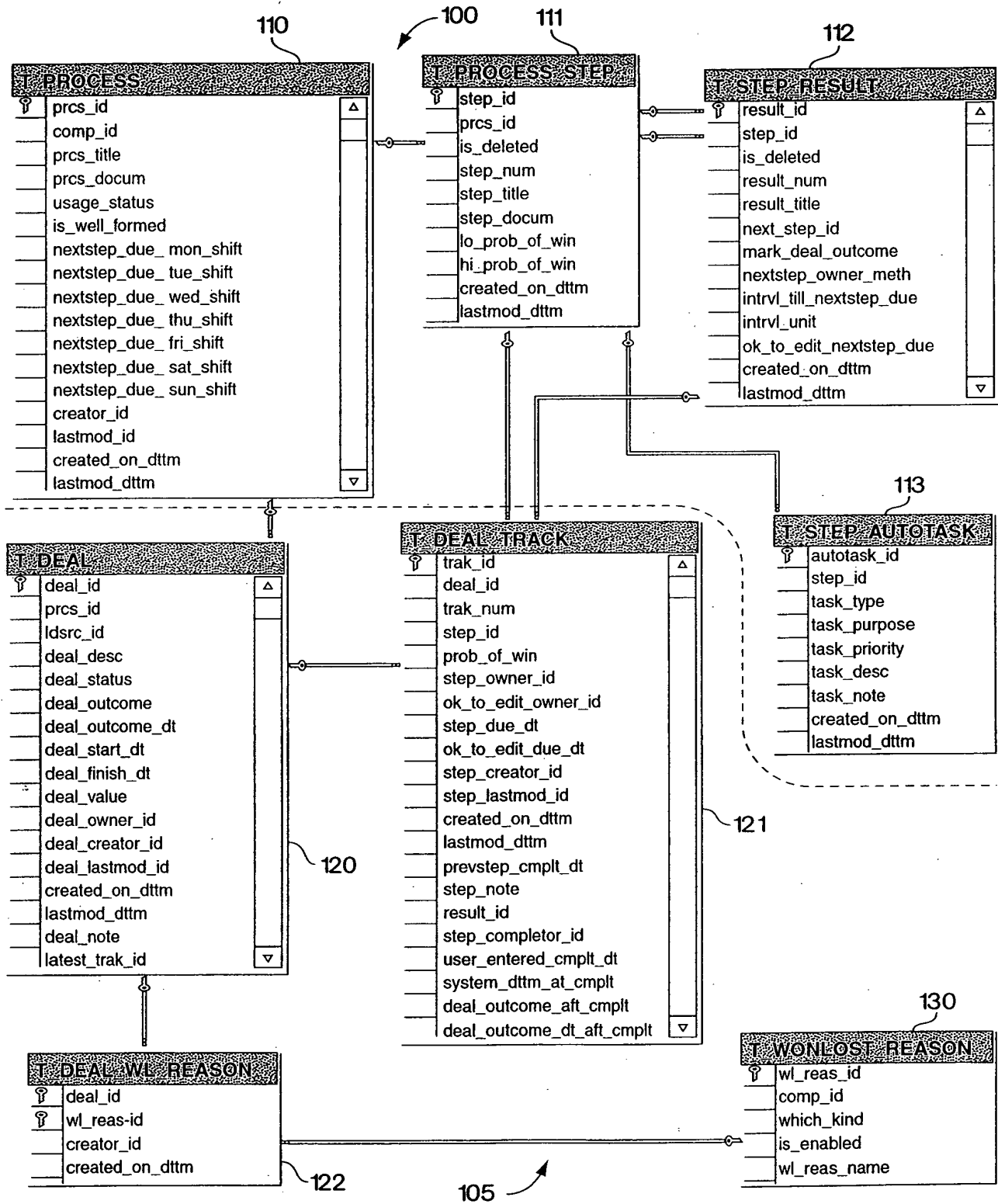


Fig. 2

3/20

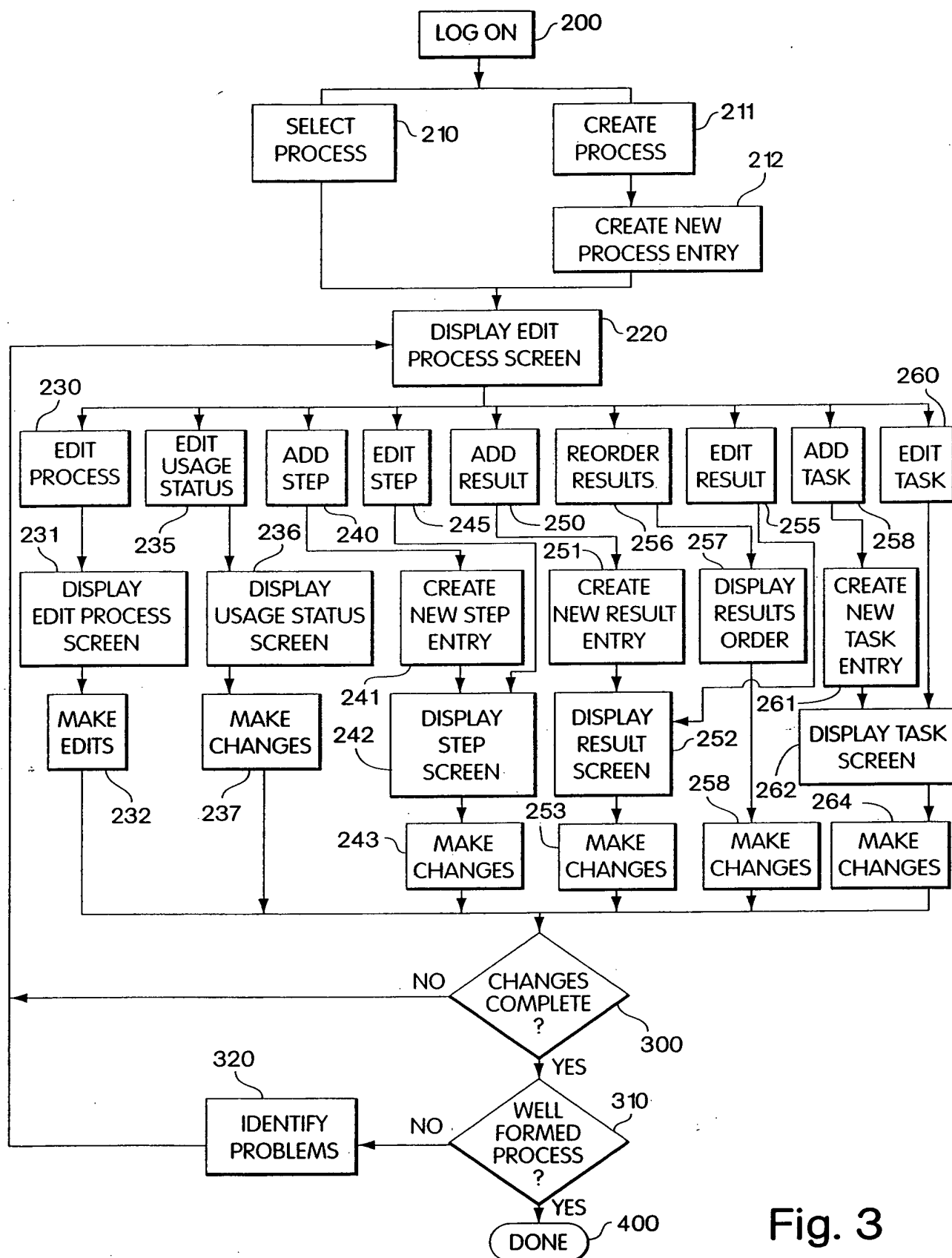


Fig. 3

511 ② **Setup : Process Builder - Edit**
 Process Name: Inbound Call (Edit) (A)
 512 Usage Status: Active (Change) (B)

©

Add Step

Print View

Copy Process

522

500

510

Step 1: Qualify (0% - 10%)

520 Results(reorder)
 530 Qualified (F) 535
 532 Not Qualified
 533 Already asked to buy

540 Auto Tasks

541 Research company financials (E)

Step 2: Contact Prospect (0% - 0%)

521 Results(reorder)
Phoned - set up demo
Phoned - left message
Faxed
Emailed

Step 3: Schedule Demo (10% - 40%)

Results(reorder)
Scheduled it
Prospect decided not to continue

Auto Tasks

Check prospect's availability

Step 4: Give Demo (50% - 50%)

Results(reorder)
Gave demo - interested
Gave demo - not interested
Demo postponed

Step 5: Close Deal (100% - 100%)

Results(reorder)
Won Deal
Lost Deal

Step 6: Fill out win/loss report (won) (100% - 100%)

Results(reorder)
Done
Not Done

Step 7: Fill out win/loss report (loss) (100% - 100%)

Results(reorder)
Done
Not Done

536 (F) Add Result | Add Auto Task (E)

Goto	Next Step Due	Next Step Owner	542
↘ 2	[1 week, Adj]	[User Delegated]	
Lost ↘ 7	[1 week, Adj]	[Current Step Owner]	
Won ↘ 6	[1 week, Adj]	[Current Step Owner]	

Task Type**Task Purpose**

Qualify

Add Result | Add Auto Task

Goto	Next Step Due	Next Step Owner
↘ 4	[2 weeks, Adj]	[Current Step Owner]
↻	[3 days, Adj]	[Current Step Owner]
↻	[3 days, Adj]	[Current Step Owner]
↘ 3	[4 days, Adj]	[Current Step Owner]

Add Result | Add Auto Task

Goto	Next Step Due	Next Step Owner
↘ 4	[2 weeks, Adj]	[User Delegated]
Lost ↘ 7	[1 week, Adj]	[Current Step Owner]

Task Type**Task Purpose**

Phone Call

Add Result | Add Auto Task

Goto	Next Step Due	Next Step Owner
↘ 5	[2 weeks, Adj]	[User Delegated]
Lost ↘ 7	[1 week, Adj]	[Current Step Owner]
↻	[2 weeks, Adj]	[User Delegated]

Add Result | Add Auto Task

Goto	Next Step Due	Next Step Owner
Won ↘ 6	[1 week, Adj]	[Current Step Owner]
Lost ↘ 7	[1 week, Adj]	[Current Step Owner]

Add Result | Add Auto Task

Goto	Next Step Due	Next Step Owner
Won ↘	[Finished]	
↻	[1 week, Adj]	[Current Step Owner]

Add Result | Add Auto Task

Goto	Next Step Due	Next Step Owner
Lost ↘	[Finished]	
↻	[1 week, Adj]	[Current Step Owner]

Fig. 4A

Salesnet - Microsoft Internet Explorer

?

Setup : Process Builder - Process Properties

Process Properties

Process Name:Inbound Call

Process Description:To handle all incoming calls

Business Day Shifting

Monday:None

Tuesday:None

Wednesday:None

Thursday:None

Friday:None

Saturday:+Mon

Sunday:+Mon

Save

Cancel

Fig. 4B

Salesnet - Microsoft Internet Explorer

Change Process Usage Status

Process Name: **Inbound Call**

Current Usage Status: **Active**

New Usage Status:

☐ Inactive

☒ **Under Construction**

Save **Cancel**

Fig. 4C

Salesnet - Microsoft Internet Explorer

Delete

? Edit Step

* Step Name:

* Step Description:

Due Diligence to see if prospect meets our criteria for a potential sale.

* Probability of Winning: Low % High %

Display Position:

☐ Save and Add another Step

☒ Save and Return to Process

Save Cancel

Fig. 4D

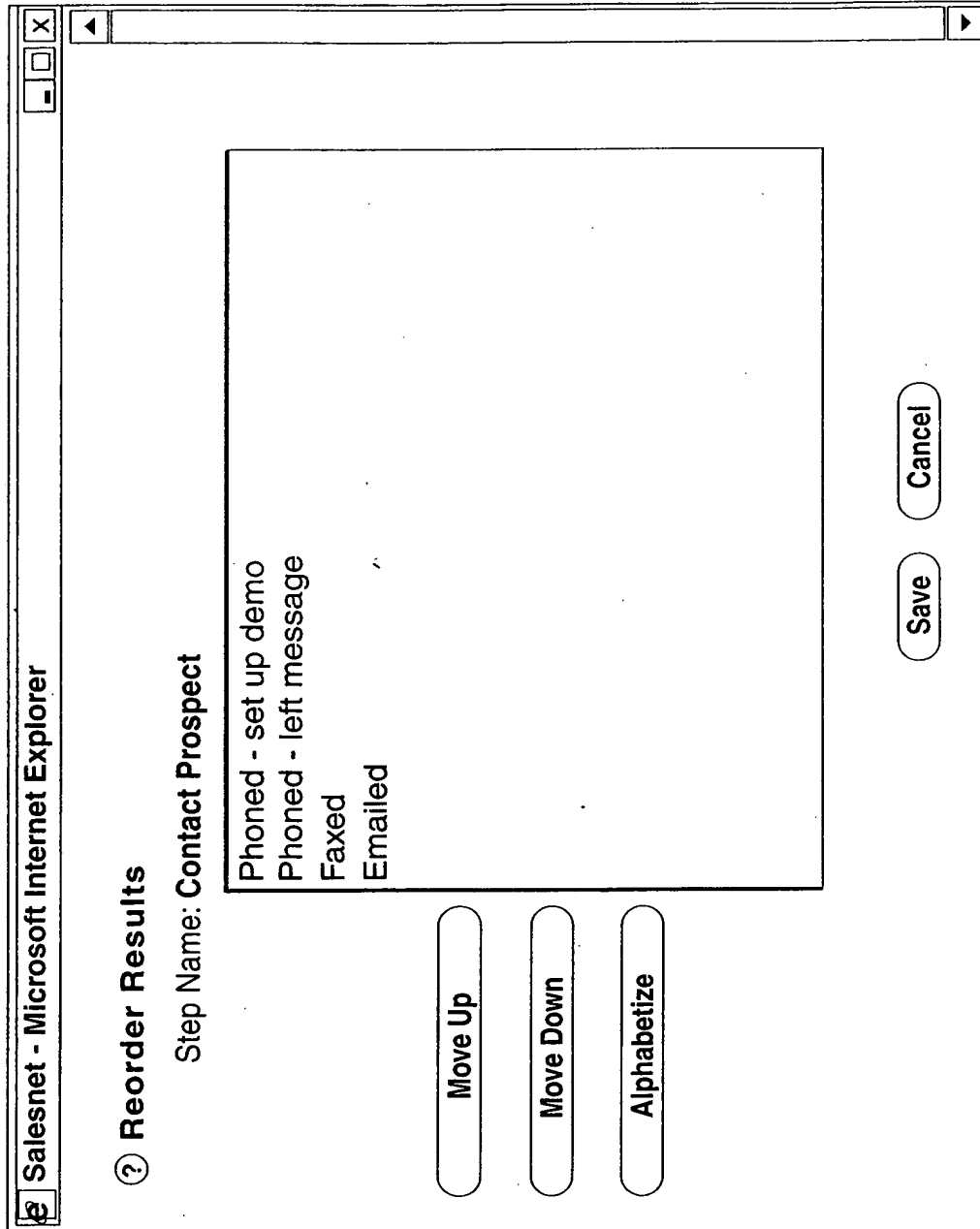


Fig. 4E

Salesnet - Microsoft Internet Explorer

Edit Auto Task

*** Task Description:** Research company finan

Task Type: ▼

Task Purpose: Quality ▼

Task Priority: ☒ Normal ☐ High

Task Note:

▼

Delete

☐ Save and Add another Auto Task

☒ Save and Return to Process Builder

Save **Cancel**

Fig. 4F

Salesnet - Microsoft Internet Explorer

Delete

? Edit Result
Step 1: Qualify

*Result Name:

Navigation: ☒ Go to Step

☐ Mark Deal as Finished

Deal Outcome: ☒ Mark the Deal as Won
☐ Mark the Deal as Lost

Time Interval: ☒ Allow User to Modify Due Date
(From this Step's Completion Date until the next Step's Due Date)

Next Step Owner: ☒ Owner of the Current Deal Step
☐ Owner of the Deal
☐ Allow User to Delegate the Next Step Owner

☐ Save and Add Another Result
☒ Save and Return to Process Builder

Fig. 4G

Ⓢ Setup : Won/Lost Reason Codes

Reasons for Won Deals

Add

		Reason	Status
<u>Edit</u>	<u>Del</u>	Faster	Active
<u>Edit</u>	<u>Del</u>	Smarter	Active
<u>Edit</u>	<u>Del</u>	Stronger	Active

Reasons for Lost Deals

Add

		Reason	Status
<u>Edit</u>	<u>Del</u>	Decided not to commit at this time	Active
<u>Edit</u>	<u>Del</u>	Went with competitor	Active

Fig. 4H

Salesnet - Microsoft Internet Explorer

Edit Won Reason Code

Description:

Status: ☒ Active ☐ Inactive

☐ Save and Add another Reason Code

☐ Save and Return to setup page

☒ Save and Return to Reason Code list

Fig. 4I

② Setup : Activity Types and Purposes

Activity Types			Add
		Types	Status
<u>Edit</u>	<u>Del</u>	Email	Active
<u>Edit</u>	<u>Del</u>	Fax	Active
<u>Edit</u>	<u>Del</u>	Letter	Active
<u>Edit</u>	<u>Del</u>	Phone Call	Active

Activity Purposes			Add
		Purposes	Status
<u>Edit</u>	<u>Del</u>	Qualify	Active
<u>Edit</u>	<u>Del</u>	Whatever	Active

Fig. 4J

Salesnet - Microsoft Internet Explorer

Edit Activity Type

Description:

Status: ☒ Active ☐ Inactive

☐ Save and Add another Type

☐ Save and Return to setup page

☒ Save and Return to List

Save **Cancel**

Fig. 4K

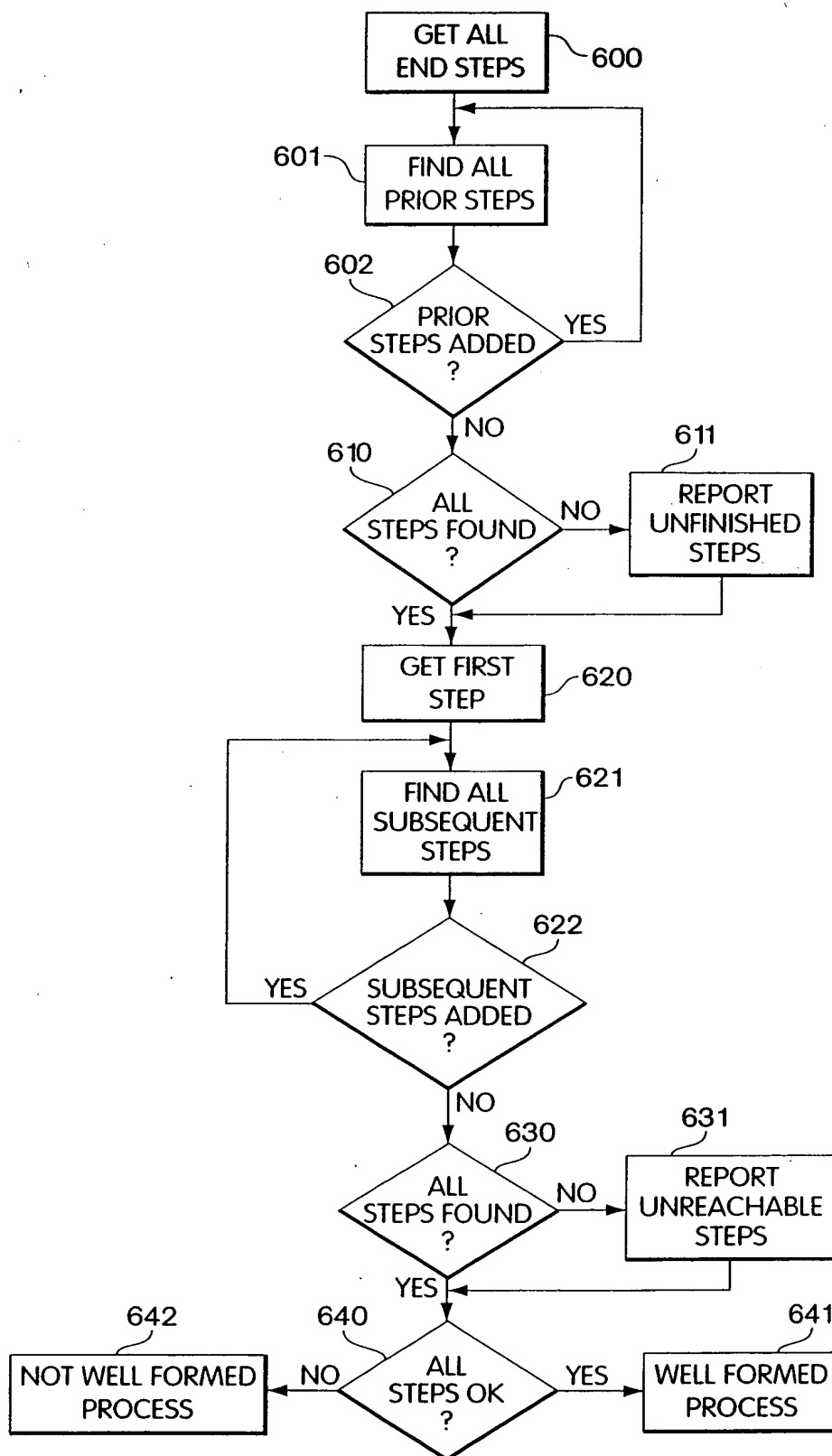


Fig. 5

700

ACCOUNTS
CONTACTS
DEALS
DEAL DETAIL
DEAL STEPS

② **El Coloso Deal (#01) (This Deal is Open)**

Process: Inbound Call

Primary Contact: Jacob Abbo, 507-271-0555

721

Complete Current Step

722

Edit Current Step

Current Step Detail

Step Name: Close Deal Step Owner: O'Connell, Diane

Step Due: 02/14/2001 Step Prob: 100 %

Step Notes:

Deal History

		Completed	Step	Result	Completed By	Prob.	Deal Outcome
edit	undo	02/07/2001	Give Demo	Gave demo - Interested	O'Connell, Diane	50%	
The demo went well. I was informed that a decision should be made by next week.							
edit	undo	01/31/2001	Contact Prospect	Phoned - set up demo	O'Connell, Diane	0%	
Will give demo to 5 decision-makers at their offices							
edit	undo	01/24/2001	Contact Prospect	Phoned - left message	O'Connell, Diane	0%	
edit	undo	01/17/2001	Qualify	Qualified	O'Connell, Diane	10%	

Fig. 6A

740

ACCOUNTS

CONTACTS

② El Coloso Deal (#01)

Process: Inbound Call

Primary Contact: Jacob Abbott

Current Step Detail

Step Name: Close Deal

Step Due: 02/14/2001

Step Notes:

Deal History

	Completed
<u>edit</u>	<u>undo</u> 02/07/2001
	The demo was
<u>edit</u>	<u>undo</u> 01/31/2001
	Will give dem
<u>edit</u>	<u>undo</u> 01/24/2001
<u>edit</u>	<u>undo</u> 01/17/2001

Salesnet - Microsoft Internet Explorer

Complete Current Step

Deal: El Coloso Deal (#01) (This Deal is Open)

Current Step: Close Deal Current Step Owner: O'Connell, Diane

Step Completion Date: 02/15/2001

Step Result: Won Deal

Notes:

Next Step Detail

Next Step: Fill out win/loss report (won) Owner of Next Step: O'Connell, Diane

Due Date of Next Step: 02/22/2001 Probability of Winning: 100 %

The Deal Outcome will be 'Won'

Select one or more reasons, if applicable:

Faster

Smarter

Stronger

Save

Cancel

741

742

745

Fig. 6B

Fig. 6C

ACCOUNTS CONTACTS DEALS DEAL DETAIL DEAL STEPS

② El Coloso Deal (#01) (This Deal is Open)

Process: Inbound Call
Primary Contact: Jacob Abbo, 507-271-0555

Current Step Detail

Step Name: Close Deal Step Ow
Step Due: 02/14/2001 Step F
Step Notes:

Deal History

	Completed	Step		Deal Outcome
<u>edit</u>	<u>undo</u>	02/15/2001	Close Deal	Won Deal
<u>edit</u>	<u>undo</u>	02/07/2001	Give Demo	Gave demo - interested
The demo went well. I was informed that a decision should be made by next week.				
<u>edit</u>	<u>undo</u>	01/31/2001	Contact Prospect	Phoned - set up demo
Will give demo to 5 decision-makers at their offices				
<u>edit</u>	<u>undo</u>	01/24/2001	Contact Prospect	Phoned - left message
<u>edit</u>	<u>undo</u>	01/17/2001	Qualify	Qualified
				0%
				0%
				10%

Hide Notes

Salesnet - Microsoft Internet Explorer

Undo Confirmation
This will make Close Deal the current step. Any information you logged for this step will be deleted.

OK Cancel

Fig. 6D

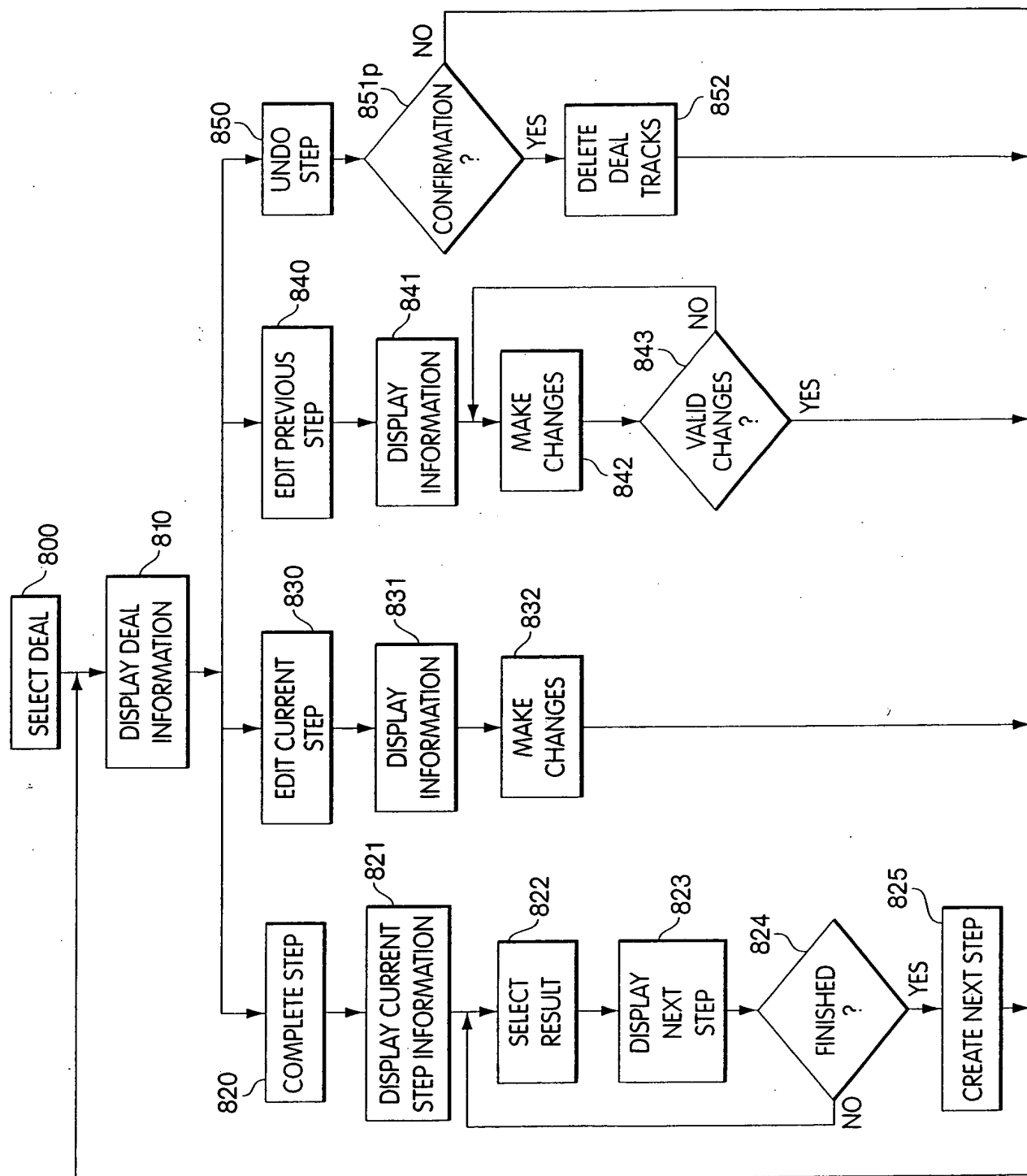


Fig. 7